Instructions
for updating agency
performance measurement and
initiative data

Fiscal Year 2005

Department of Planning and Budget
August 2005

Overview

This section provides an overview on updating performance measurement data

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This package of instructions provides guidance on updating your agency's FY 2005 performance measurement and initiative data. The update needs to be made for all performance measures and initiatives in Virginia Results, including those that were moved over from the Executive Agreements last year. This is the last time that Virginia Results will be used to input annual updates of performance measures. DPB will be working with you and your Secretary to determine which performance measures included in your July 15, 2005, strategic and service area plans will be reported on a year from now.

You will input your updates directly into the Virginia Results web site. All information entered in Virginia Results will be made accessible for public viewing.

Agencies are to update their performance measurement and initiative data by **September 1, 2005** with the latest information. ***Notify your DPB budget analyst by email when you have completed your update.***

Do not modify existing measures or initiatives or add additional measures. Also, do not change your measures to coincide with what you submitted in your July 15 service area plans. You may, however, add new initiatives that began this fiscal year.

These instructions apply to all Executive Branch agencies, with the exception of institutions of higher education, unless otherwise notified.

Pursuant to Section 30-133 of the Code of Virginia, the Auditor of Public Accounts (APA) staff will conduct follow-up reviews of agency performance measures. APA staff may contact your agency to obtain additional information about your performance measurement data collection efforts and how you calculated your measures.

Please ensure that the information you provide is accurate. Last year the APA found a few measures where mathematical and other errors occurred. It is important to maintain any documentation to support the data in the event it gets selected in the APA sample.

Updating your performance measures and initiatives

Obtaining a UserID and Password

To access your agency's performance management section on *Virginia Results*, use your User ID and password. If you have forgotten your password or do not know your User ID, go to the "Need Help" link on the Virginia Results login screen and enter your Email Address. If you are a registered user of Virginia Results, your account information, including your password, will be emailed to you.

If you are not registered and need to have a User ID and password set up, then you must contact DPB via email at perform@dpb.virginia.gov. Please include your Name, Title, Phone number, and the Agency to which you need access. DPB will then send an email providing your account details. After logging in you should visit the "Change your password and account information" link to verify your information and change your password from the default password set up by DPB.

How to enter data in *Virginia Results*

To update your agency's performance measures in *Virginia Results*, follow these instructions:

1. From DPB's web site (dpb.virginia.gov), click on the link entitled "Strategic Planning" then scroll down to the bottom of the page for a link that will take you to *Virginia Results*.

2. Enter your User ID and password. If correctly entered, this takes you to your Agency's Planning and Performance page or the list of agencies if you have access to more than one.

3. On the left side of your agency's planning and performance page, you will see the links to modify your Performance Measures and Initiatives and on the left side of the screen are options for running reports to display and print your agency's data. **Do not update your mission statement, customers, objectives, or activities**.

Updating performance measures

1. Do not add or delete measures.

2. Indicate whether the measure is a number or percent and whether the trend is increasing, decreasing, or staying the same.

3. Add or update the target value and the target date. The target value is a quantifiable estimate of the expected results at a future date. The target should be challenging, yet achievable. It should stretch the capacities of the agency but nonetheless must be realistic. The target date should be the future date in which you hope to achieve your target value. Provide in the "Explanatory Note" field an explanation if the actual results exceed the target.

4. Using the dropdown selections, indicate when you began collecting data and how frequently you report on the information.

5. Update the measures. Make sure that the data is shown from the date the data was first collected until current. Provide in the "Explanatory Note" field an explanation for any blank fields. You may also want to explain any wide variations in the data.

6. Review and update, if necessary, the primary data source and how the measure is calculated.

Updating initiatives

1. For each initiative, add a brief narrative statement in the "Status" field for each initiative. The narrative should describe the current status of the initiative. If the task has been completed, indicate the date it was completed and state what the final product was. Do not delete completed initiative.

2. Add any new initiatives that were implemented this fiscal year and indicate the current states.

3. Revise, if necessary, the order field. This controls the order the initiatives show up in the report.

Need help?

- To obtain additional on-line help when completing these forms, click on the round question mark links on the forms.

- For additional questions, please contact your budget analyst.